ACCESS *ai* IDAHO

PAYPORT™

Clerk User Manual

Access Idaho's PayPort™ customizable point-of-sale system conveniently enables your agency to accept credit/debit card payments (Discover, MasterCard, VISA) for virtually any type of sales transaction.

This manual details the steps necessary for you to create and process transactions for customers who pay in person, by fax, or by telephone.

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Section 1: PayPort at a Glance

Username of person signed in

Search for and print past transactions

Ends user's session

Catalog numbers/codes and item names

Customer's cost per item

Displays catalog(s) associated with user

Not searchable

Item name

Deletes sales tax on entire transaction

The number or code unique to an item

Area for entering additional information (searchable)

Access Idaho convenience fee (if charged to customer)

Section 2: Optional Card Reader

While a credit/debit card reader is not required to use PayPort, it does improve a transaction's speed and accuracy when a card is presented for payment.

Access Idaho sells card readers (see Figure 1 and features below) at cost, however you are welcome to use existing readers or order new ones on your own. Regardless of the type or brand, be sure the reader you use features **keyboard emulation**. *NOTE: The computer(s) you connect card reader(s) to must have internet access.*

Magtek Card Reader Features

- Keyboard emulation
- Powered by USB (No external power supply required)
- Scans either direction
- Includes USB interface
- Green/red LED
- Part #21040109
- www.magtek.com
- Questions? Call Access Idaho at 208-332-0102.

Dimensions
Height: 1.23 in (31,3 mm)
Width: 1.28 in (32,5 mm)
Length: 3.94 in (100 mm)

Figure 1 Magtek Credit Card Reader

One Step Set-up

Simply plug the card reader into a computer's available USB port (Figure 2). The reader's light should turn green, and your computer may make a sound to confirm a successful connection.
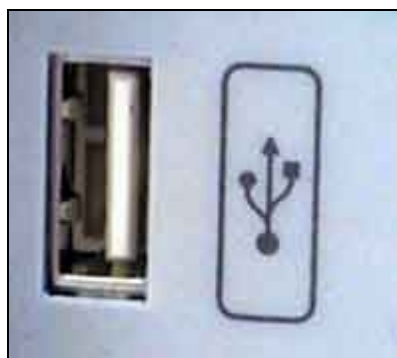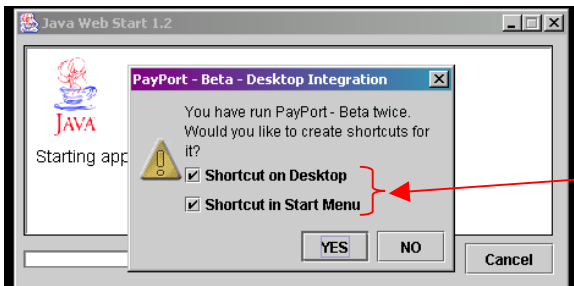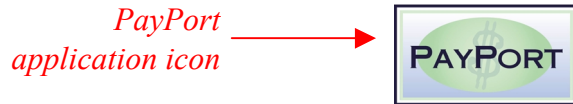
Figure 2 USB Port

Section 3: Logging into PayPort

NOTE: If your computer does not have the PayPort application installed on it, go to http://idaho.gov/payport to download the software.

Double-click the PayPort link or icon located on your desktop.
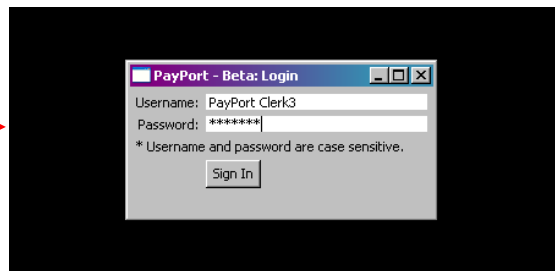
PayPort application icon →

When launching PayPort for the first time, you will have the option to save a shortcut to your Desktop and/or Start Menu for easier access.

Each time you log-in, PayPort automatically updates your version of the software and loads it while displaying the following screens:
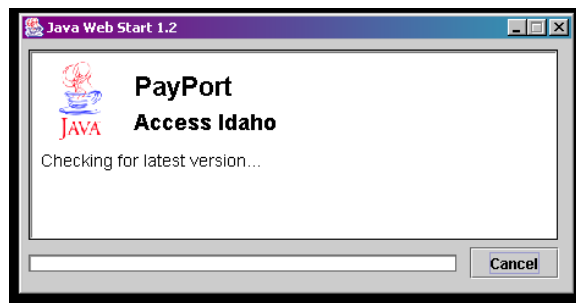
Login screen →

Section 4: Item Types

The following examples illustrate common item types and how they are entered in PayPort. Consult your agency's Catalog Manager for questions or further details.

Item Type Examples:

1. **Fixed Price—Item with the same pre-set price per item, regardless of quantity**

2. **Price/Note—Item with pre-set pricing and space for additional info**

3. **Variable Price/Comment—Item with manually entered price and space for additional info**
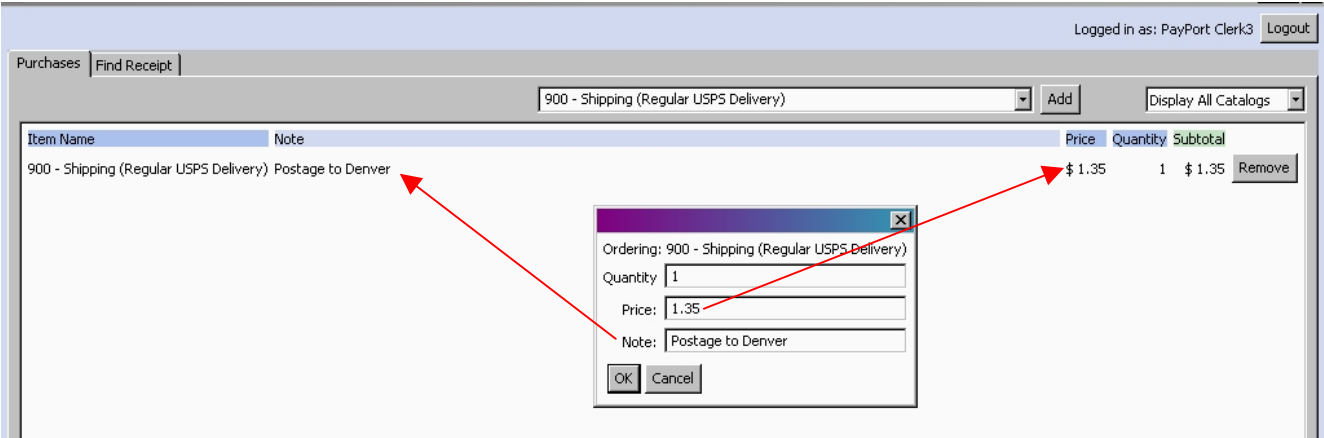
4. **Tiered Pricing—Items with different pre-set prices based on quantity**
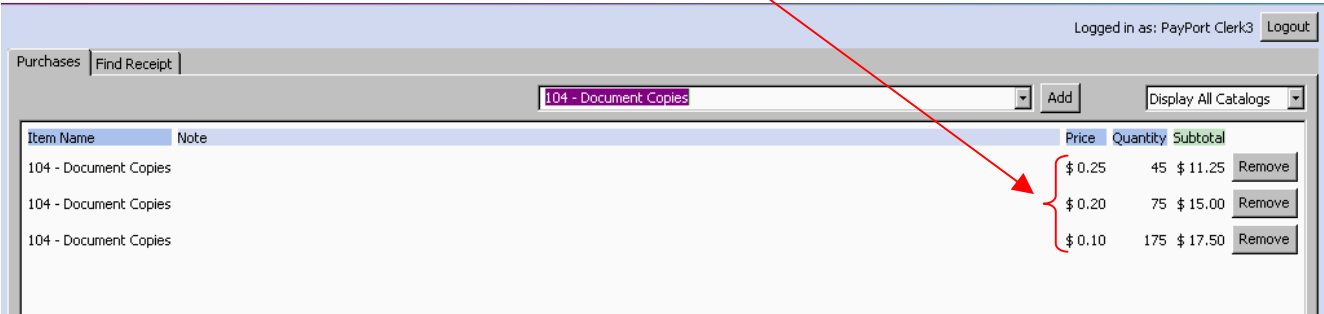
5. **Taxable—Items pre-set to automatically add sales tax to transaction**

6. **Non-taxable—Items which are pre-set not to add tax**

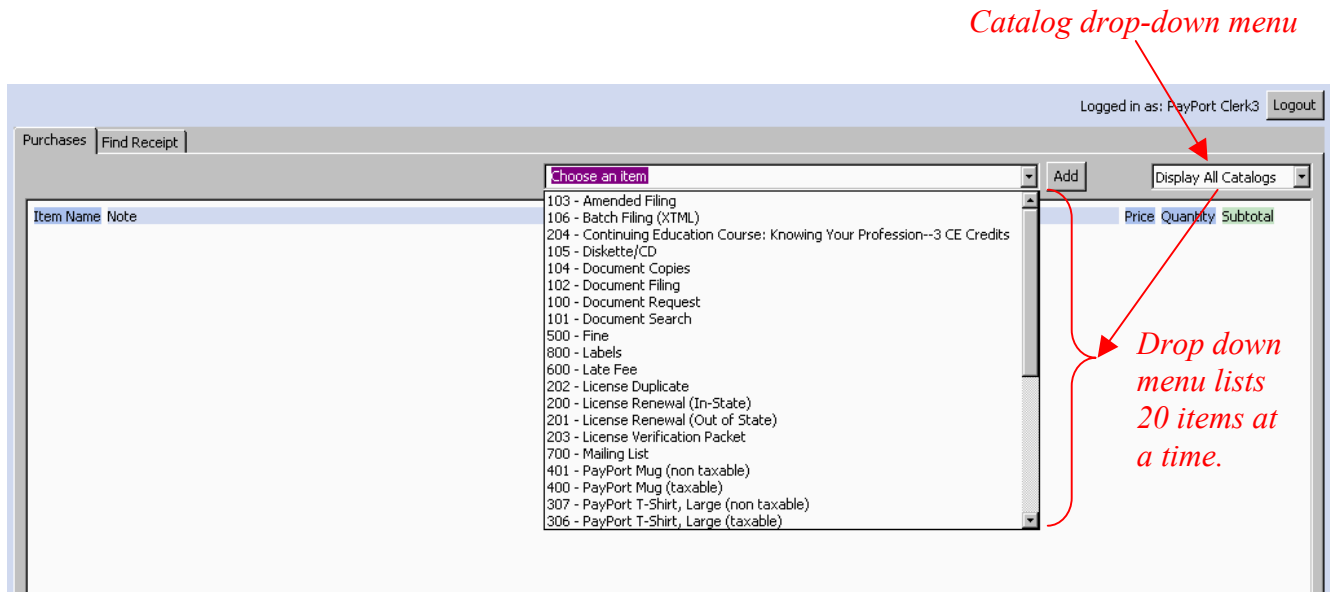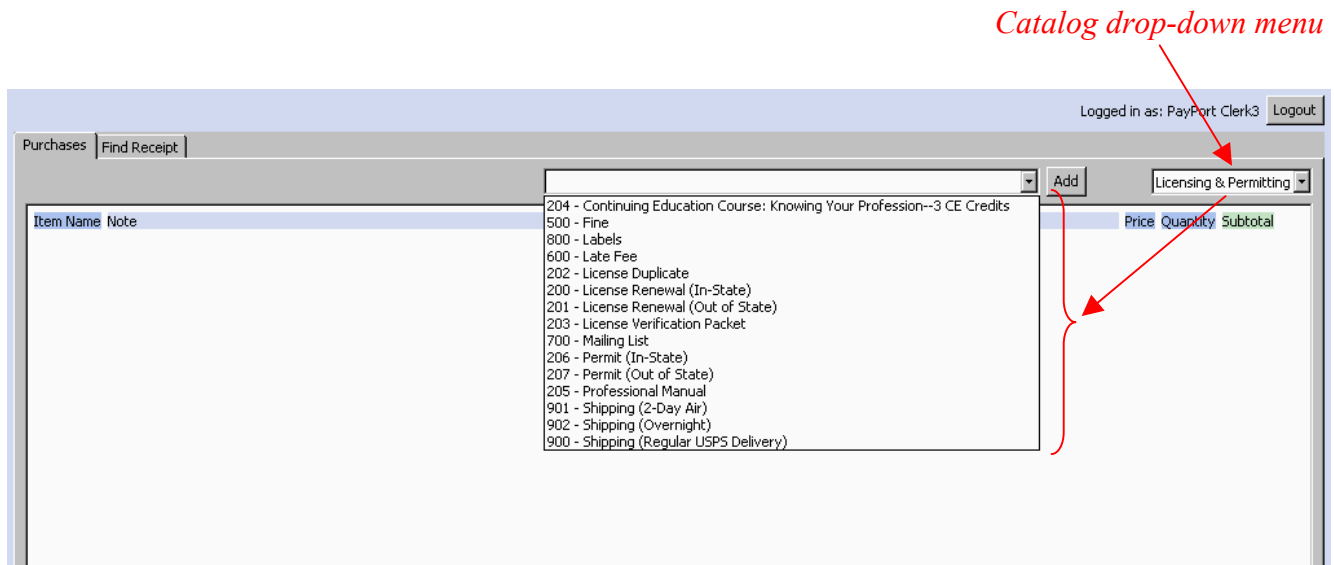*An entire transaction can be made non-taxable by clicking this button.*

Section 5: Viewing Catalogs

PayPort defaults to showing all catalogs assigned to your username.
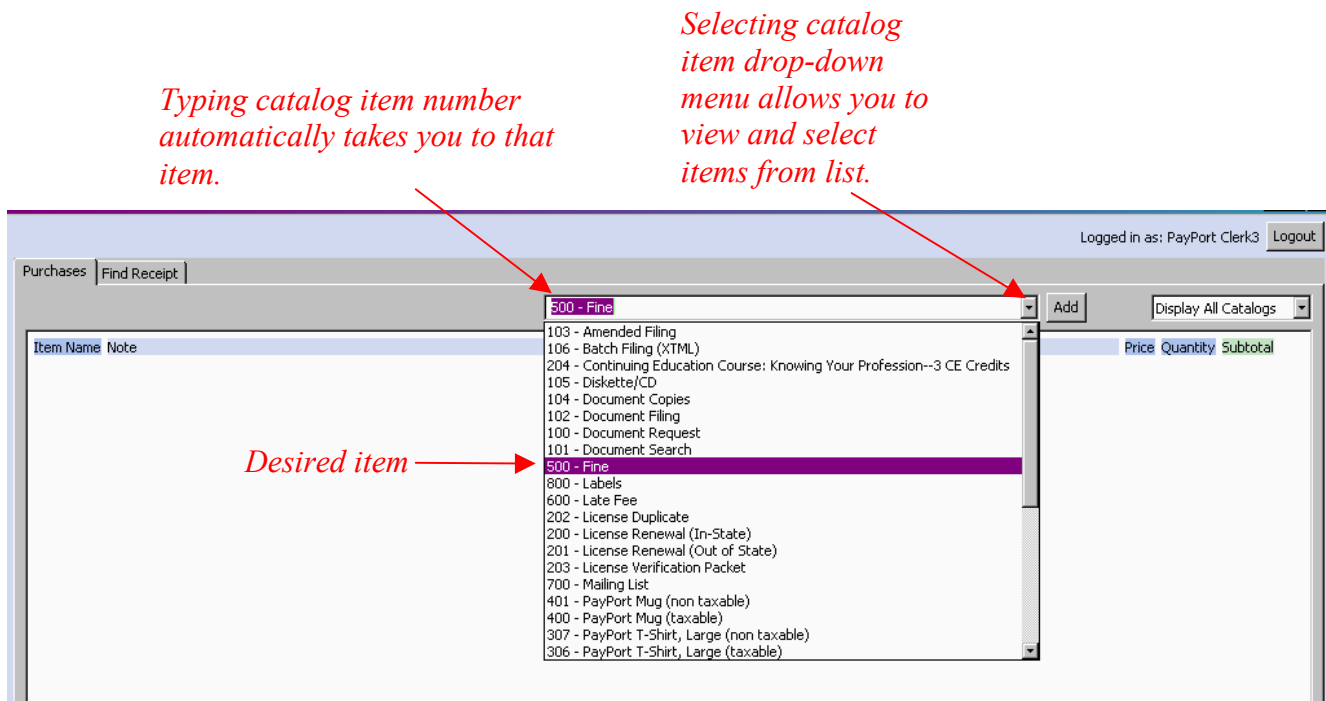
Catalog drop-down menu

Drop down menu lists 20 items at a time.

To view only items in a specific catalog, select the catalog drop-down menu and highlight the desired catalog.

Catalog drop-down menu

Section 6: Selecting Catalog Items

***Step 1.* PayPort allows you to find and select catalog items in different ways. It even allows you to navigate between features using only your "Tab" key.**

Selecting catalog item drop-down menu allows you to view and select items from list.

Typing catalog item number automatically takes you to that item.

Desired item

***Step 2.* Click the "Add" button to display the quantity window for that item.**

Minimum quantity is 1.

Depending on how your Catalog Manager configured an item, this window may include fields for entering a price and/or note.

Step 3. **If applicable, enter price and/or note and select "OK."**

No decimal is necessary for whole dollar values (i.e. $1, $2, $3…).

The non-searchable info entered here is placed under the "Note" column on the Purchases screen as well as the transaction receipt.

Step 4. **Click inside Comment field (searchable) to add more info.**

Step 5. **After all the items for a transaction are entered, select "Continue>>."**

Section 7: Shipping/Billing Info

Step 1. **Select from the two transaction types.** ***Note: Your agency Catalog Manager is responsible for controlling which fields to display or require, so please check with them for specific policies.***

Step 2. **If required, enter agency order number and credit/debit card billing address (use "Tab" key to jump between fields). Otherwise, you may leave fields blank.**

Step 3. **Indicate shipping address, if applicable. Selecting "shipping address below" automatically displays fields for information entry.**

Step 4. **Click "Continue>>" after entering information.**

Section 8: Transaction Review Screen

This screen allows you to check the transaction for accuracy one last time before continuing to the billing stage.

To proceed to the credit/debit card information screen:

- **Select the "Continue>>" button**

OR

- **Swipe the customer's debit/credit card (Discover, MasterCard, or VISA) through your card reader**

Section 9: Credit/Debit Card Information Entry

There are two easy ways to enter a customer's credit/debit card (Discover, MasterCard, or VISA) information:

▪ **Swipe card through card reader (information populates fields automatically)**

OR

▪ **Manually *(check carefully before clicking the "Finish" button)***

Clicking this button sends card information for processing

Transaction stage

Section 10: Receipt Features

Clicking the "Print" button at the bottom of the receipt page allows you select a printer and the number of receipts to print.

*PayPort **On-screen Receipt** Example:*

Transaction ID (receipt number)

Your agency's order number (optional)

Credit/debit card number (Section 9)

Entered in "Note" field—not searchable (Section 6, Step 3)

Entered in "Comment" field on item entry page—searchable (Section 6, Step 4)

Billing/shipping/contact info (Section 7)

Transaction stage

Logged in as: PayPort Clerk3 Logout

Purchases | Find Receipt

Receipt
3169 - Card Present Transaction
Order #787659: 01/07/2005 12:59 PM

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

Item	Price	Qty	Comment	
Document Filing	$ 3.00	1		$ 3.00
License Duplicate	$ 5.00	1		$ 5.00
Shipping (Regular USPS Delivery)	$ 1.87	1	Postage to Denver	$ 1.87

Subtotal	$ 9.87
Sales Tax	$ 0.00
Processing Fee	$ 1.30
Total	$ 11.17

For license #48938205

Billing Address
Simple Simon
P.O. Box 1060
Firth, ID 83236

v:303-555-1212

simplesimon@pie-man.com

Shipping Address
Simple Simon
1200 W. Main Street
Denver, CO 80220

①②③④⑤

New Transaction | Print

Please see next page for *printed* receipt example.

*PayPort **Printed Receipt** Example:*

```
PayPort Agency
999 W. Main St., Ste. 910          Header (set-up by Catalog Manager)
Boise, ID 83702-9011
Phone: (208) 332-0102
                                        Internal order number (optional)
3152 - Card Present Transaction
Order #787659 12/29/2004 02:24 PM
Sale by Donna Teller                    Text set-up by Catalog Manager

Visa XXXX XXXX XXXX 2301
Your credit card statement will indicate that Access Idaho has billed you for:

For license #48938205
Document Filing                  1 @        3.00           3.00
License Duplicate                1 @        5.00           5.00
Shipping (Regular USPS Delivery) 1 @        1.87           1.87
                                        Subtotal:      $ 9.87
                                        Sales Tax:     $ 0.00
                                     Processing Fee:   $ 1.30
                                            Total:     $ 11.17

                                        Page 1 of 1

Simple Simon
P.O. Box 1060                    Billing information
Firth, ID  82639
ph: 208-555-9282  simplesimon@pie-man.com
Thanks for your order!
                                        Footer (set-up by Catalog Manager)

Signature:_____
```

Header (set-up by Catalog Manager)

Internal order number (optional)

Text set-up by Catalog Manager

Items

Comment (searchable)

Billing information

Footer (set-up by Catalog Manager)

Section 11: Finding Transaction Receipts

Find receipts from transactions you completed by entering search information into one or more data fields and clicking the "Find Transactions" button. Please see your agency's Catalog Manager for assistance.

Search receipts by:
- **Swiping Credit/Debit Card**
- **Information on Receipt**
- **ACH ID (deposit number)**
- **Transaction Lifecycle**
- **Authorized or Cleared Date Range**
- **Transaction Total**